Instructions for responding to Requirements Workbooks:

These requirements have been formatted into workbooks as a more efficient and effective way not only for a vendor to respond; but for KHPA to evaluate as well.

The workbooks have been compiled by category. Within each category subsections have been broken down into worksheets and placed into tabs that have been labeled accordingly.
Within the worksheets notice that after the “Requirement” column the columns proceed as followed: “Requirement for Phase 1, Response, Explanation of Response and Response Reference.”
The purpose of each column is defined below.

- Implementation Phase - Respond with a 1, 2 or 3 to indicate the anticipated phase of implementation (A detailed description of the three phases can be found in the RFP.)
- Response - is the column where the proposer will respond to whether or not the requirement is met and to what extent. (Detailed instructions below.)
- Explanation of Response - Please provide an Explanation of how the requirement is or isn’t met and validate the (0-5) rating given in the “Response” column.
- Response Reference - Please indicate where, throughout your response proposal, this is described in detail.

Proposer Fit Rating Response Codes: In the “Response” column please provide a Yes or No indicating whether or not the requirement is met. In addition to Yes or No, include a number rating indicating to what level the proposed solution meets the requirement. (Example of Response – Yes/3)
Fit Rating 5: Solution meets the requirement without any customization or configuration to implement.
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(Rating system and brief explanation can be found at the top of each worksheet as a reference tool.)

Please note that some requirements have been highlighted. These requirements have been deemed optional and KHPA requests pricing be cost out separately for the indicated requirements.
Please Respond to these under the "Optional Costs" in the Separate Cost Proposal.

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Function: Public Self-Service Portal - The Contractor must provide a public web portal which allows members and other private customers to obtain and retrieve information. Members are able to log onto the system to view personal information. These requirements apply to all modules or components of the public portal.					
Req #	**Requirement**	**Implementation Phase**	**Response**	**Explanation to Response**	**Response Reference**
	General Requirements for Self-Service Portal				
PSSP-001	Single website (homepage) must be used for central access to multiple system applications (e.g. complete application/review, report changes, check status, complete self assessment, check eligibility).				
PSSP-002	Portal must be accessible from multiple entry points, e.g. other state agency websites, community partners, public locations, etc.				
PSSP-003	Portal must be accessible using devices such as smart phones, laptop, net books, iPad, etc.				
PSSP-004	Content on the Portal must be accessible in multiple languages. At a minimum, the following languages will be supported at implementation: English, Spanish, Chinese, French, Japanese, Korean, Arabic, Farsi, German, Hmong, Lao, Russian, Somali, Swahili, and Vietnamese. Additional language support may be required at a later date.				
PSSP-005	Must accommodate diverse populations of users including those with visual and hearing impairments, persons with low and moderate educational levels, and the elderly. (508 compliant) http://www.section508.gov/				
PSSP-006	Must capture website traffic statistics and associated details (for example; customer kiosks, libraries, clinics, homes, completes, hits, counties, etc.) and have the ability to generate reports based upon traffic statistics. (Web analytics)				
PSSP-007	Must have a customer satisfaction survey option (e.g. is this helpful?). Must provide the ability to generate reports based upon survey results.				

PSSP-008	Must track types of inquiries received and click-through from our site to other sites through links.				
PSSP-009	Must provide multiple output options for customer to include but not limited to, e-mail, print, 'save-to-file', etc.				
PSSP-010	Must allow a customer to securely log into the self-service system to access personal and protected information. The following two requirements PSSP-010 and PSSP-011, are applicable if the customer has securely logged on.				
PSSP-011	Must allow a customer acting on behalf of an applicant/recipient to have the same access as the applicant/recipient, but with their own log on. For example, a guardian or responsible person can complete an application and check benefits.				
PSSP-012	Must *not* allow a customer to view information on any other account.				
PSSP-013	Must provide a single sign on option for persons with access to multiple records. For example, an attorney who serves as a guardian for multiple programs or a foster parent with several foster children does not have to log into the system when viewing multiple records they are authorized to view.				
PSSP-014	Must have the option to establish a username and password upon initial entry to any secure module.				
PSSP-015	System must lock out a previous household member from viewing case information. (for example, an ex husband accused of domestic violence, previous foster parent)				
PSSP-016	Must automatically save information for a customer who is logged on. (KHPA will define automatic time parameter.)				
PSSP-017	Customer must have the ability to save work in progress (e.g. form, application or review, etc.)				
PSSP-018	Customer must have the ability to regain access to saved work.				
PSSP-019	Must have automatic expiration of incomplete work to be determined by KHPA.				
PSSP-020	Must have the ability to notify the applicant prior to expiration that their incomplete work will be deleted.				
PSSP-021	Available message center for the customer with automatic notification of new/unread messages/alerts upon log on (e.g. new program for which this household may be eligible, change of address, ID card changes.				
PSSP-022	Must provide the ability to establish one logon that works for all components of the portal.				

PSSP-023	System must timeout when it has been idle for a set time. Length of time to be determined by KHPA.				
PSSP-024	Must have the ability to electronically submit supporting documentation to be routed with the submission of online work. (e.g. report, application or review.)				
PSSP-025	Must provide a summary page of customer information entered and must have the ability to allow the user to update customer information via hyperlink.				
PSSP-026	Content of the portal must be easily modifiable by business staff. (e.g. customer application questions.)				
PSSP-027	Must capture and track all customer information entered through the portal.				
PSSP-028	Must have the ability to generate reports based on flexible criteria which can be produced by business staff. (eg. ad hoc)				
PSSP-029	All portal web pages must provide a logical flow to questions, must direct the customer to the next logical step based on the responses. (for example, a single male is not asked about pregnancy and a person is asked about the value of a resource only after indicating there is a resource.)				
PSSP-030	Each portal web page provides a brief description of the content and use of the page.				
PSSP-031	Must provide an optional online demonstration to walk the user through each module (e.g. the application process, reporting a change.)				
PSSP-032	Must confirm successful transmission of submitted customer information (change, application, review) and include confirmation number and contact information for the receiving location(s). (e.g. Clearinghouse field office.)				
PSSP-033	The system must be able to identify and route one application to multiple locations due to program and policy rules. (e.g. SOBRA)				
PSSP-034	Must be able to automatically notify customer and worker when applications are sent to multiple locations.				

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Function: Self Assessment (SELF) - The Self-Assessment tool allows an individual member of the general public to evaluate potential eligibility for medical assistance.

Req #	Requirement	Implementation Phase	Response	Explanation to Response	Response Reference
SELF-001	Must provide a self assessment portal to be used by external partners and customers to evaluate potential eligibility. This process does not replace the formal application process and determination.				
SELF-002	Must apply eligibility rules and identify and flag potential categorical and financial eligibility.				
SELF-003	Must identify and flag expedited or accelerated benefits cases.				
SELF-004	Must be able to use summarized household data for self assessment process. (e.g. two adults and two kids and estimated income.)				
SELF-005	Must automatically recommend medical programs for which customer may be eligible based on customers answers to a series of questions and allow them to apply for the benefits.				
SELF-006	Must inform customer in real time of general verification requirements and timelines.				
SELF-007	Must inform customer in real time of other potential program eligibility and/or resources (with appropriate web links). (e.g. SNAP (Food Assistance), TANF, WIC, Lions Club, Voc Rehab, etc.)				
SELF-008	Must have the ability to provide informational fact sheets on recommended programs.				
SELF-009	The information entered into the self assessment portal web page must populate the online application if an customer chooses to apply.				
SELF-010	Must track applications that originate from self assessment portal web page.				
SELF-011	Must allow a customer to use the web portal without entering personally identifying information.				

SELF-012	Must allow a customer to securely log into the application system to access a view of the self assessment portal with personal information.				
SELF-013	Must have the ability to use existing information on a known customer, securely logged into the portal, to complete a new self assessment.				
SELF-014	The self assessment portal must detect and by-pass programs for which a securely logged in customer is already receiving benefits.				
SELF-015	Must provide a solution to discourage and reduce the use of the self assessment portal to manipulate a situation to determine responses necessary to qualify. (e.g., a customer completes multiple assessments each with varying income amounts to determine qualifying income level.)				
SELF-016	Must allow KHPA the ability to limit the use of the assessment portal web page for certain programs and eligibility conditions to state staff only, or to other authorized staff only. (e.g. the transfer of property calculator will not be available to the public as it may encourage Medicaid Estate Planning.)				

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Function: Application Intake (INTK) - Provides an on-line, web-based intake application to apply for medical assistance.

Req #	Requirement	Implementation Phase	Response	Explanation to Response	Response Reference
INTK-001	Must provide a web application to apply for any medical assistance program.				
INTK-002	Must provide a web application that captures demographic information about the household and individual members of the household.				
INTK-003	Must capture basic information for each person (e.g. name, SSN, date of birth, etc.)				
INTK-004	Must capture all required data elements for each medical program.				
INTK-005	System must identify and process information based on customer information entered on the application. (e.g. less information required for some expedited services/benefits.)				
INTK-006	Must automatically populate information for customers known to the system and securely logged on to the portal (e.g. SSN, dob, name, address, etc.)				
INTK-007	Must automatically determine, set and capture application date timestamp.				
INTK-008	Must determine application date based on timestamp and program rules (e.g. if application received on a holiday or non-business day, 12/25/10 - application date would be the next business day.)				
INTK-009	Must allow applicant to specify the programs they are applying.				
INTK-010	Must have the ability to void an application.				
INTK-011	Must store all voided applications.				
INTK-012	Must have the ability to view all voided applications.				
INTK-013	Must have the ability for applicant to withdraw application.				

INTK-014	Must identify mandatory fields which were not completed during the application process.				
INTK-015	Must identify information and documents needed to complete the application process, based on the responses provided by the customer.				
INTK-016	Must allow customers to submit the application electronically with an electronic signature that complies with state, federal and agency requirements and standards. The signature shall require an acknowledgement, under penalty of perjury, by the applicant or authorized person completing application that the rights and responsibilities related to the application process have been read and are understood.				
INTK-017	Must route the application to the appropriately designated staff person or work queue (KHPA, SRS, KDHE, etc.)				
INTK-018	Must notify the appropriately designated staff that an application has been submitted (e.g. provide a hyperlink).				
INTK-019	Must provide the option for a customer to apply on behalf of a different customer (e.g. guardian, DPOA).				
INTK-020	Must capture name, address, phone number and relationship of customer who applies on behalf of a different customer.				
INTK-021	Must capture the name, address and phone number of community partners or advocacy organizations that have assisted the customer with the application.				
INTK-022	Must identify a customer who is currently receiving medical benefits if they are known to the system.				
INTK-023	Must have the ability to allow the customers to gauge progress in application process.				
INTK-024	Must retain completed applications with various retention schedules. All application data must be easily retrievable.				
INTK-025	Must place ninety-nine percent (99%) of all submitted applications to the correct location and work unit.				
INTK-026	Applications must be loaded on the State imaging system				

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Function: Changes (CHNG) - Provides a tool for consumer to review benefits and report changes without contacting a worker.

Req #	Requirement	Implementation Phase	Response	Explanation to Response	Response Reference
	Must allow a customer who is logged in to do the following:				
CHNG-001	Check information about their case, including but not limited to case status, coverage levels, pending information needed and due dates, outstanding claims, and patient liability.				
CHNG-002	Report changes to their case, including but not limited to household changes, marital status, income, resources , requests for case closure.				
CHNG-003	Must be able to view all notices of action, including dates sent.				
CHNG-004	Access information for all members of the case with a single log on.				
CHNG-005	System must interface with the MMIS Member Web Services portal operated by HP, by allowing a customer to access information in the HP member portal to be accessed without an additional log on.				
CHNG-006	Must have the ability to interface with web portals of other entities delivering benefits. (e.g. coverage plans offered by healthcare reform)				
CHNG-007	The system must generate an e-mail notifying customer that new information is available online (if e-mail address was provided). Can also apply for text message option.				
CHNG-008	Must allow a customer to view overpayment and repayment history.				
CHNG-009	Must allow customer and approved external entities. (e.g. nursing homes, facilitator, HCBS case manager, etc.) Access to view information on authorized accounts.				

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Function: Pilot (PILT) - KHPA requires piloting the application system (PE, Self Assessment and the Online Application - PHASE I) prior to full implementation. KHPA will use the existing PE providers as the pilot locations. (Considering other possible pilot locations - such as a nursing home.)					
Req #	**Requirement**	**Implementation Phase**	**Response**	**Explanation to Response**	**Response Reference**
PILT-001	Must provide a lock-out solution that shall allow only designated pilot participants to access the online system (such as a pilot only login page).				
PILT-002	Must have all issues identified during the pilot phase to be resolved as per the time period as defined by KHPA.				
PILT-003	Must provide full technical support as needed during the pilot phase.				
PILT-004	Must provide updates as required, to KHPA regarding issues identified during the pilot as well as proposed solutions to resolve any issues.				
PILT-005	Must maintain an Issue, actions, resolutions, status logs for all calls received throughout the pilot phase.				
PILT-006	Must have any issues identified during the pilot phase resolved within 5 business days of completion of the pilot.				